

Synergist Wealth Advisors LLC Ranked Among Top Wealth Advisors for Client Satisfaction



San Diego, California (February 1, 2009) – **Synergist Wealth Advisors LLC President, Paula de Vos, CFP®** has been recognized as a **2009 FIVE STAR: Best in Client Satisfaction Wealth ManagerSM**.

More than 40,000 high-net worth residents in the San Diego area and subscribers of *San Diego Magazine*, as well as an additional 7,000 leaders of financial service industry companies, were surveyed to identify the “best in client satisfaction” wealth managers that service the San Diego area.

“Outstanding client satisfaction has been one of our highest priorities since inception and we are honored that we are recognized for providing Five Star Service,” said Paula de Vos, Founder. *“Synergist Wealth Advisors strives to consistently provide outstanding service for all of our clients. We are grateful to all our colleagues and industry team players and find success in this accomplishment.”*

Survey recipients were asked to select only wealth managers whom they knew through personal experience and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value-for-fee charged, meeting of financial objectives, post-sale service, quality of recommendations and overall satisfaction.

Only wealth managers with minimum five years of experience in the financial services industry were considered and each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies.

Before finalizing the list, each wealth manager was reviewed by a blue-ribbon panel that was comprised of knowledgeable individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

The resulting list of 2009 FIVE STAR Wealth Managers is an elite group, representing less than 3% of wealth managers in the San Diego Area.

San Diego Magazine formed a partnership with Crescendo Business Services, an independent research firm, to develop and complete the survey. For more information on the FIVE STAR Award and the research/selection methodology, go to: www.fivestarprofessional.com/wmresearch

Synergist Wealth Advisors LLC (www.synergistwealth.com) is an independent, fee-only wealth management firm that serves entrepreneurs, high-net worth families and individuals. The firm has been nationally recognized for leading financial advice, is a Registered Investment Advisor and maintains membership in the Financial Planning Association (FPA).

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